Mage World

"Help Desk Pro" User Manual

Version: 1.0
Website: http://www.mage-world.com/
Support: support@mage-world.com

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I. Help Desk Pro overview

Nowadays, it is time of the era of ecommerce. Trading online is a hard competition, in which every one want to take advantage. They compete against each other by all ways, from quality, price to service. Market researchers showed that “customer support” was one of the best keys to win customers’ hearts and this determining issue affects on customers purchasing behavior directly. So, no company can ignore this, then owning a system that helps their supporting activity become efficiency is a must.

Basing on the need of market, **Mage-World** determines to develop **Help Desk Pro** extension. We are sure that this extension will match all your requirements of a customer support system and push you toward your customers quickly.

II. Functionality Defining

Help Desk Pro provides an efficient and flexible mechanism of receiving and replying customers’ request. Your customer can send ticket from **Help Desk** form, Magento contact form or by their emails. For enterprise, you can manage replies easily with reasonable decentralization and have a general look of all support activities with ticket statistic. That is the reason why even with a large support system or professional supporting companies, **Help Desk Pro** is still a perfect choice.

Due to the fact that it is hard to control the vulnerability from message auto-senders that attack directly to your system via mail receiving system, **Help Desk Pro** contains a secure method, which protects your data from spam and detections.

Beside, for saving time, you can create popular questions and answers with the feature *Quick Response.*

If you are interested in our extension and wonder the ways it works, please following the next.

III. Installation.

- Copy folder app, skin, js to your Magento root folder.
- Make sure to clear cache in admin of Magento.

- Go to System/Configuration, **Help Desk Pro** is on the left side. Click on it and change the configuration as you wish. Also, you can find the tab **Help Desk Pro** on the top menu.
- Refresh the front-end and see how **Help Desk Pro** works.

Note that:

At the first time, if you login admin after installing extension, then you see message "access denied", please try to logout and login again.

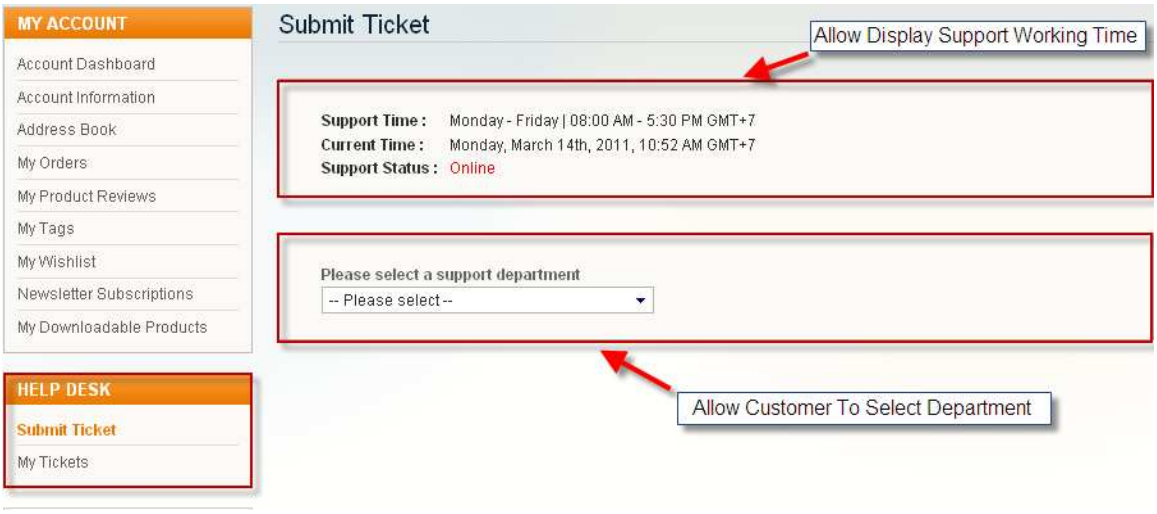
If you have any problem please email to: support@mage-world.com.

IV. Introduce *Front-end*.

Help Desk Pro is integrated with *Magento Contact Form*, so customer can send ticket from *Magento Contact Form* or *Help Desk Pro* page.

1. Help Desk Pro page

To access on **Help Desk Pro** page, customer have to have an account. They login their account and the **Help Desk Pro** tab can be find at left bar in *My Account* page.



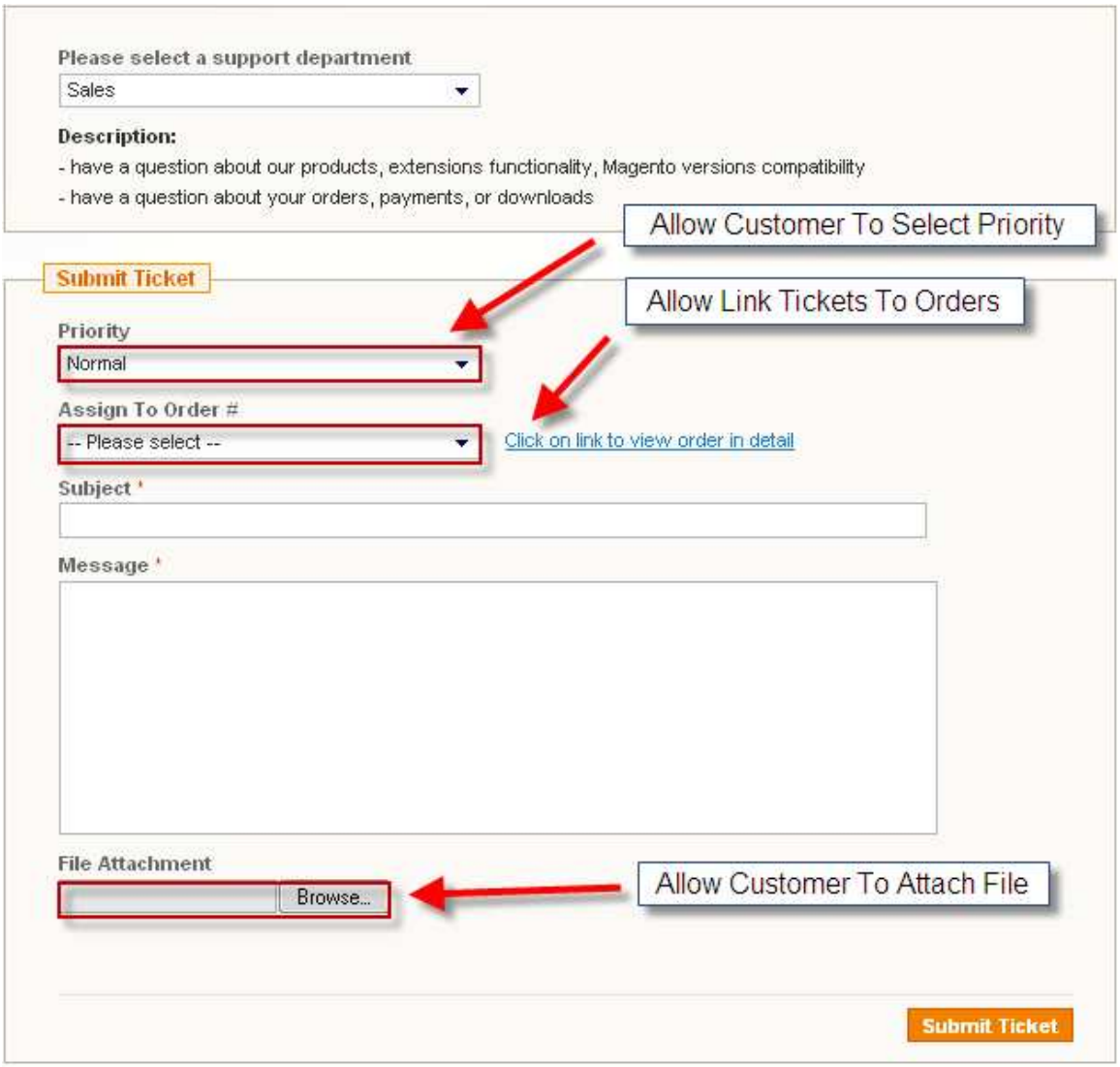
Help Desk Pro includes 2 sub-tabs, *Submit Ticket* and *My Ticket.*

My Ticket displays ticket history.

Submit Ticket is the place for customer to send their request. When customers click on the tab *Submit Ticket*, they will see a screen like the image above. The first box shows information of business time and support status. Customer chooses a department that he

wants to shoot an email to at the second box. Admin can choose to hide this box in configuration, and all ticket sent from **Help Desk Pro** page will be sent directly to the default department, which is set by admin at back-end.

After customer select a department, this box will be loaded:

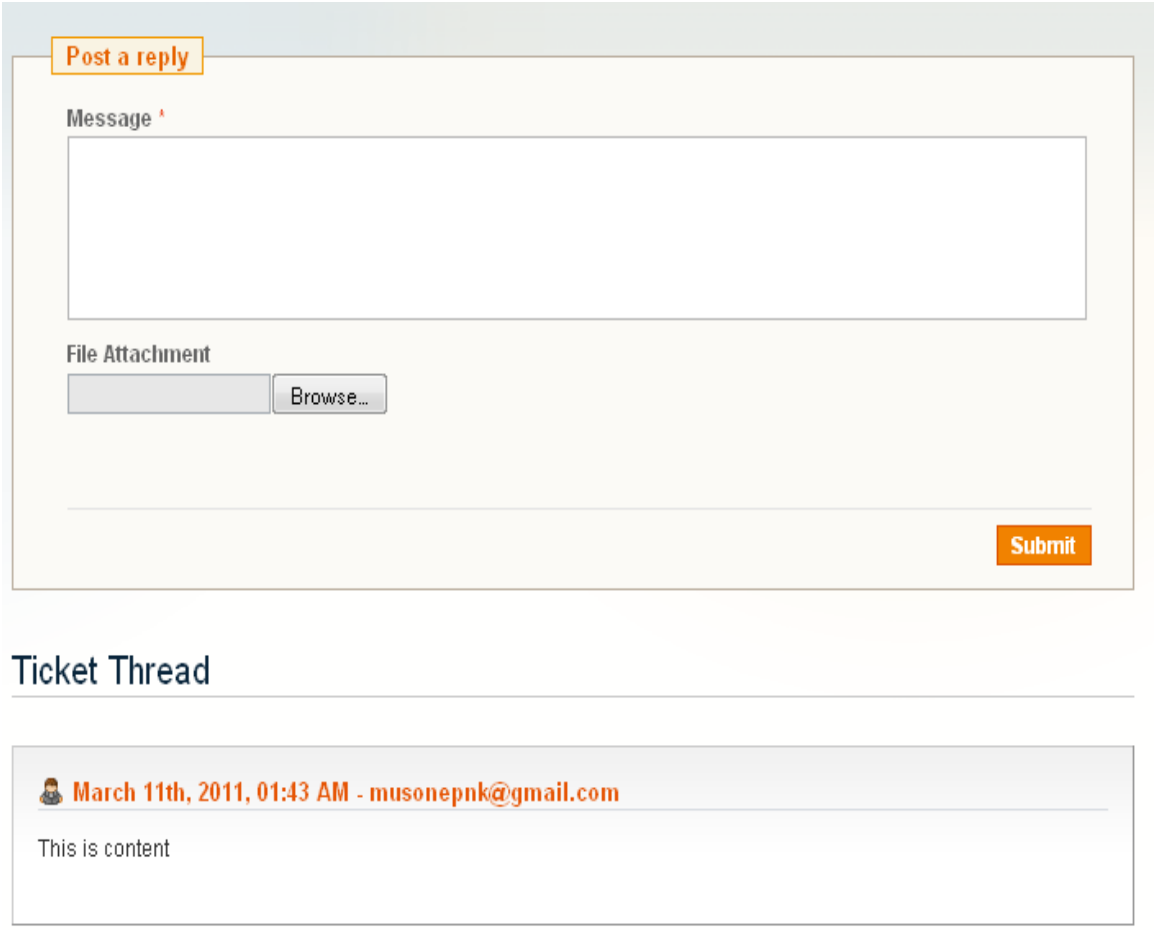


Customer will see description of the selected department and the *Submit Ticket* area. This form allows customer to select ticket priority, assign related-order for his ticket, and attach file. If customer does something wrong, don't worry, alert message will direct him to correct. Max size upload notification is an example.

If customer wants to assign an order for his ticket, he can choose this order in the field *Assign To Order #.* To see detail, move mouse to *Click on link to view order in detail*, all information of this order will be shown.

After customer sends a ticket successfully, system will notify him on screen and drop a notification into his email, then update history immediately. The customer can review all his tickets by clicking on *My Ticket.*

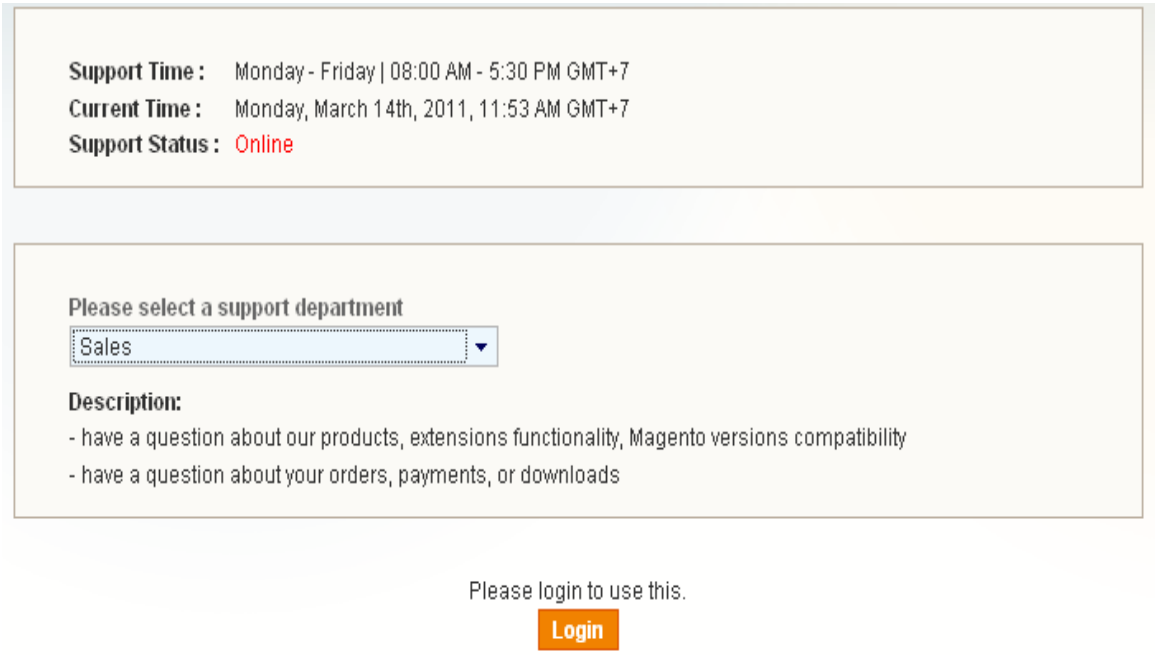
My Ticket shows all information of created tickets such as *date, subject, assigned department, priority, status*. To view detail and reply, click on *View Detail,* and you can see the screen below:



2. *Magento Contact form*

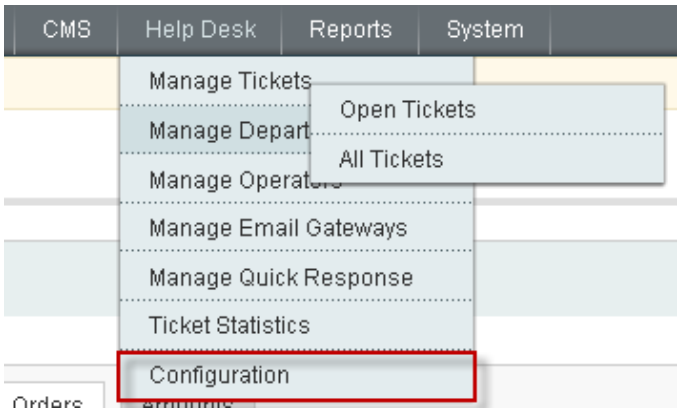
As we said above, **Help Desk Pro** integrates with *Magento Contact Form*, so customer can create ticket by clicking on *Contact Us* at the footer of site.

When customer chooses department, he can see some login required departments and not-required ones. If customer chooses a department that requires to login, system will direct him to login page. Otherwise, *My Account* page is shown, customer finds the **Help Desk Pro** tab and he can start creating ticket as normal.


Support Time : Monday - Friday | 08:00 AM - 5:30 PM GMT+7
Current Time : Monday, March 14th, 2011, 11:53 AM GMT+7
Support Status : Online
Please select a support department
Sales
Description:
- have a question about our products, extensions functionality, Magento versions compatibility
- have a question about your orders, payments, or downloads
Please login to use this.
Login

V. Introduce Back-end

At back-end, you can find the menu **Help Desk Pro** at the top bar.



1. Software Setting step by step

To make sure the **Help Desk Pro** system works properly, you should follow steps in correct order below:

*1/ Turn on **Help Desk Pro** by set the field Enable in configuration to Yes*

*2/ Add operators (please view **Manage Operator**)*

*3/ Create Department (Please view **Manage Department**)*

*4/ Create Gateway (Please view **Manage Gateway**)*

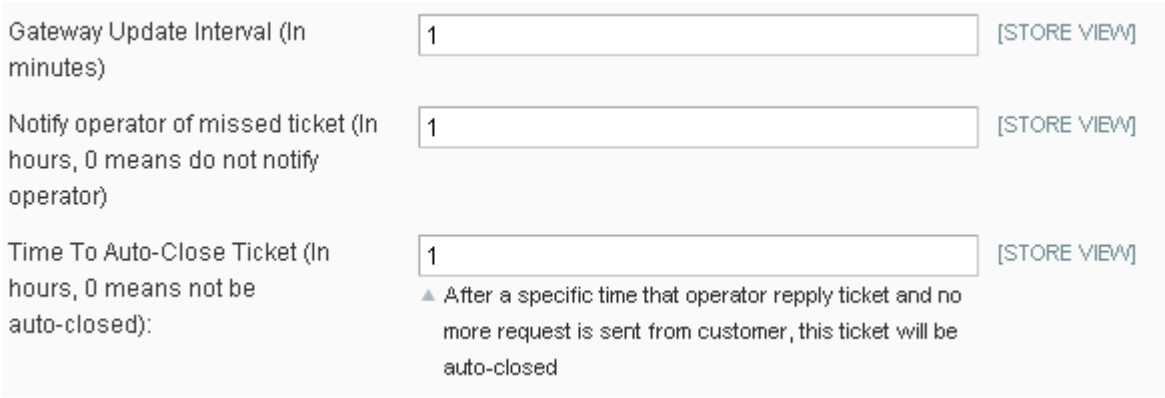
5/ Now, you can test how **Help Desk Pro** works (create ticket at front-end or send mail, then check at **Manage Ticket**)

2. Configuration

To set a general configuration for this system, please access on *Configuration* by following the path *System/ Configuration/ Help Desk Pro* or click on *Configuration* in the menu *Help Desk Pro* at top bar.

Firstly, you can turn on/off Help Desk Pro by set the field *Enable* to Yes/No.

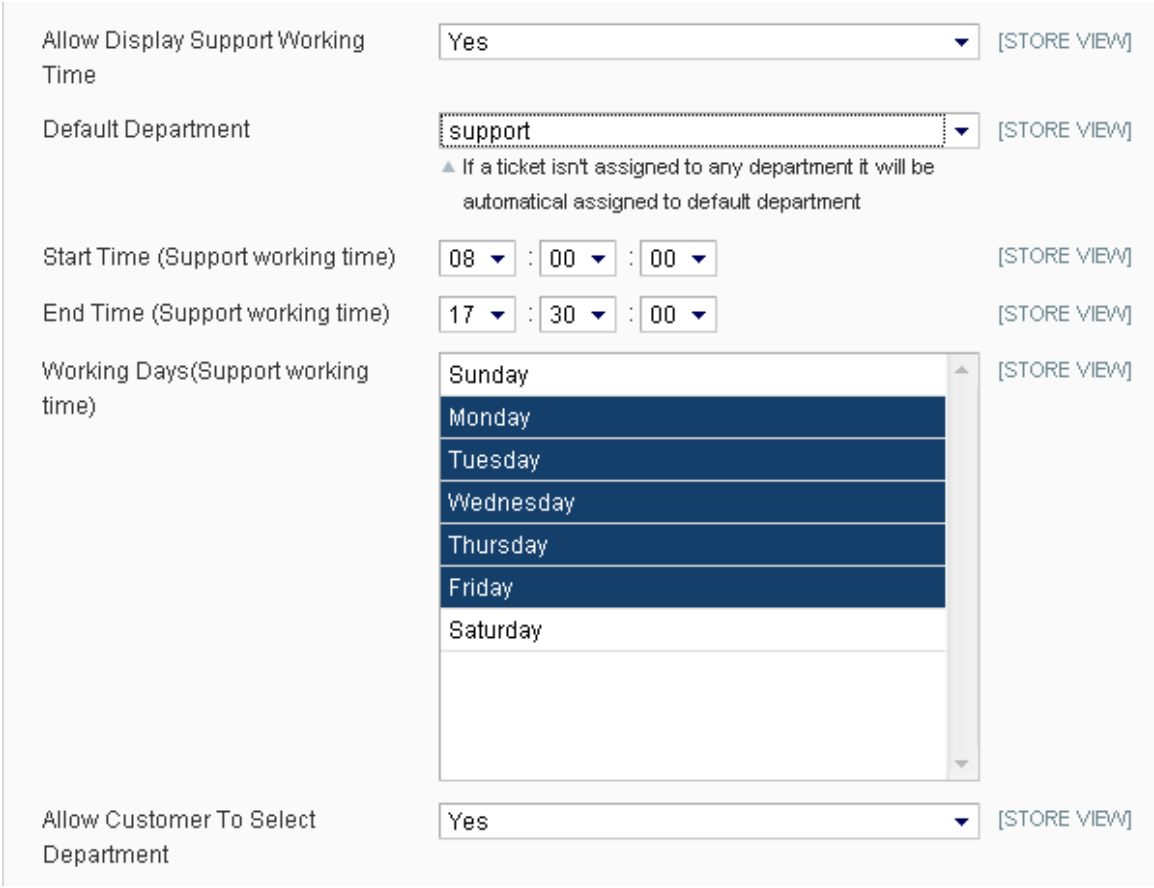
Next, free choose the below options as you want:


Gateway Update Interval (In minutes)
1
[STORE VIEW]
Notify operator of missed ticket (In hours, 0 means do not notify operator)
1
[STORE VIEW]
Time To Auto-Close Ticket (In hours, 0 means not be auto-closed):
1
[STORE VIEW]
After a specific time that operator repply ticket and no more request is sent from customer, this ticket will be auto-closed

Gateway Update Interval: time to auto-update gateway (in minutes).

Notify operator of missed ticket: After a specific time that operator don't reply a ticket, the system will send a notification to him for warning (in hours).

Time to auto-close ticket: After a specific time that operator reply ticket and no more request is sent from customer, this ticket will be closed (in hours).



Allow Display Working Time: Choose Yes if you want to display your company's working time at front-end.

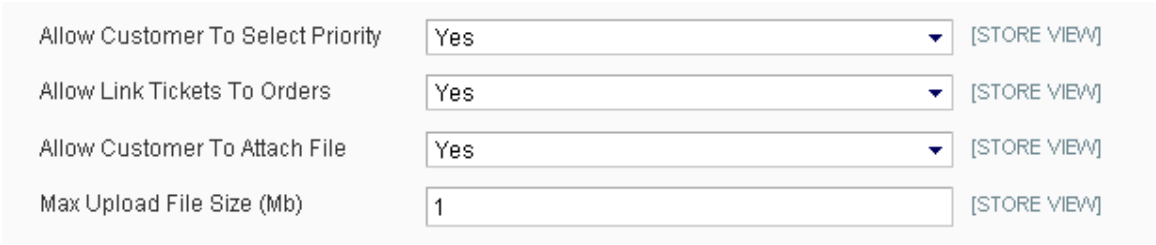
Start Time: Select Start business time for supporting customer of your company.

End Time: Select End business time for supporting customer of your company.

Working Days: Select business time of your company (multi-selected).

Allow Customer to select Department: Choose Yes if you wish to allow customer to select department at front-tend.

Default Department: Choose a department. When you set the field *Allow Customer to select Department* to No, every customers' tickets, creating from Help Desk form and Magento Contact Form will be sent directly to this default department(Note: not be applied for ticket sent from email, this will be set when creating Gateway).

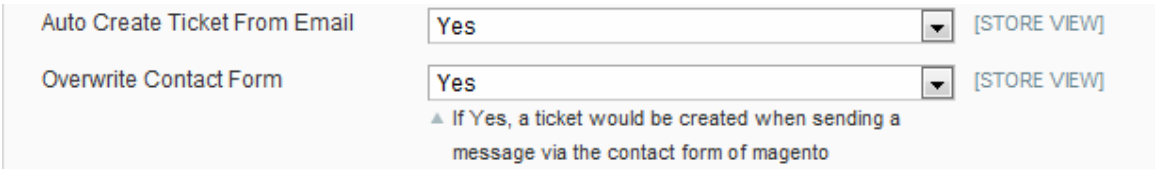


Allow Customer to Select Priority: Choose Yes if you wish to allow customer to assign priority for ticket.

Allow Link Tickets to Orders: Choose Yes if you wish to allow customer to assign order for ticket.

Allow Customer to Attach File: Choose Yes if you wish to allow customer to attach file.

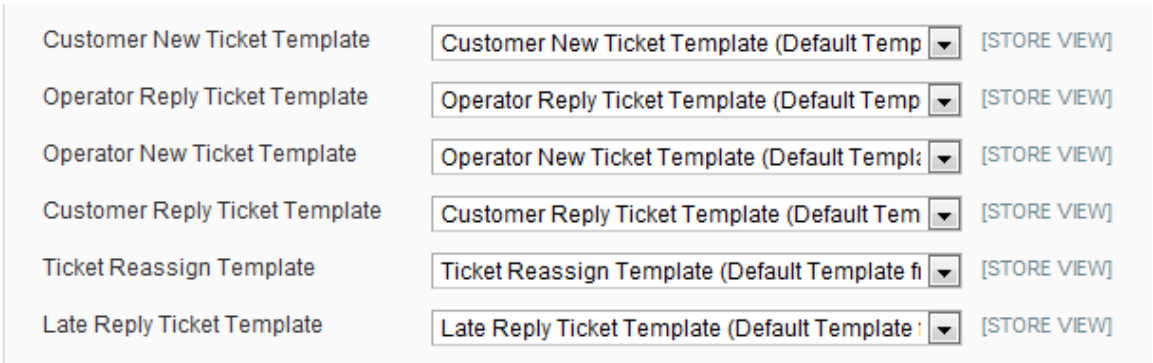
Max Upload File Size (Mb): Insert capacity limitation for attachment file (there is alert massage if customer choose an over-size file.)


Auto Create Ticket From Email
Yes
[STORE VIEW]
Overwrite Contact Form
Yes
[STORE VIEW]
If Yes, a ticket would be created when sending a message via the contact form of magento

Auto Create Ticket from Email: Choose Yes if you wish the system auto-creates ticket when customer send request via email.

Override Contact Form: Choose Yes to activate Magento Contact Form Integration.

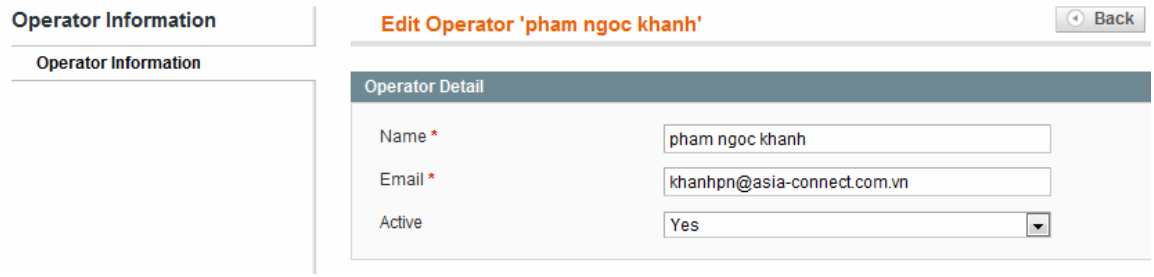
The fields below allow you to choose default email template, we will provide more information at the part of **Email Template**.



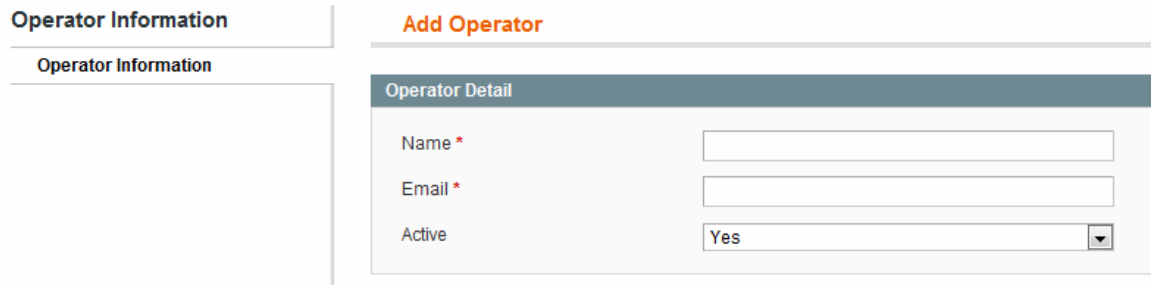
3. Manage Operators

You can add and manage operators by going to *Help Desk Pro – Manage Operator.* This page display list of operators, click on the one that you want to edit or click to *Add Operator* if you want to add new.

Edit operator

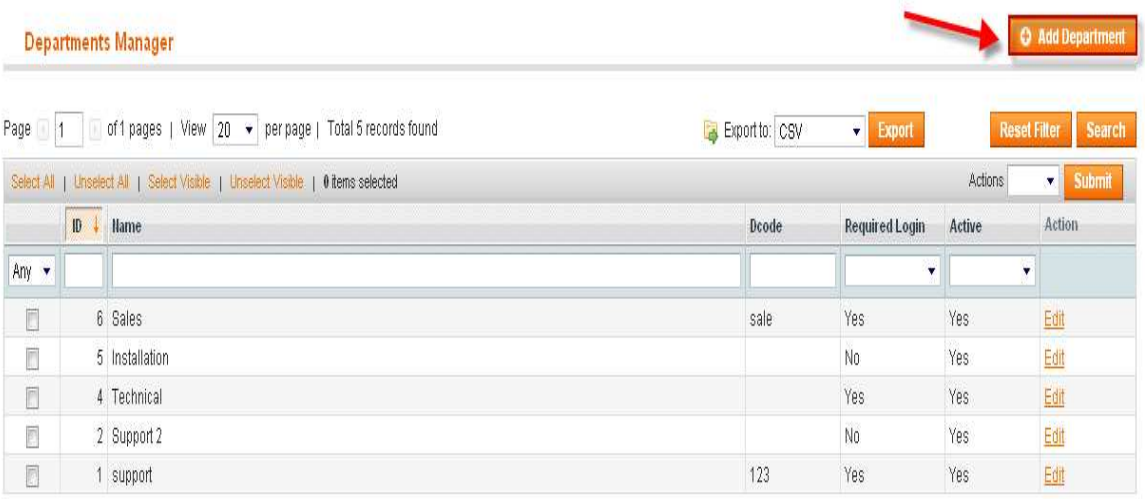


Add Operator

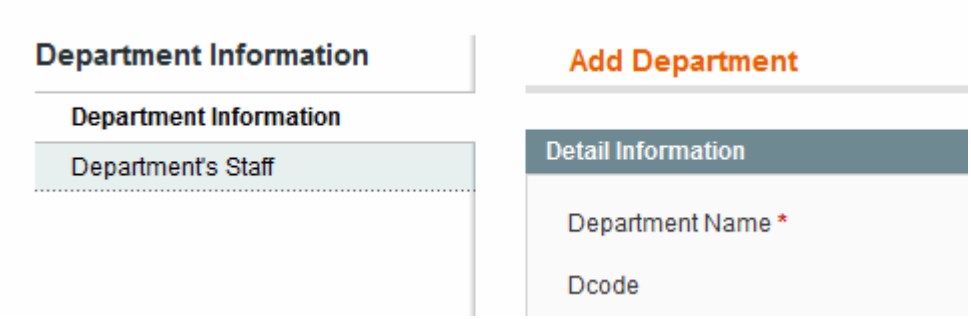


4. Manage Departments

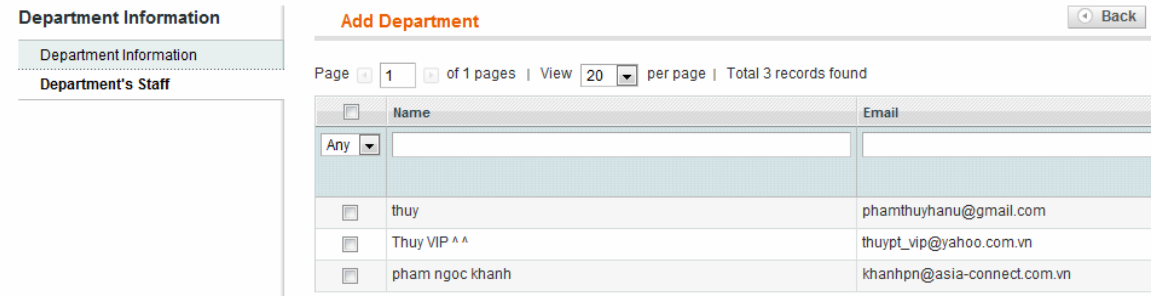
At backend, go to ***Help Desk Pro*** – ***Manage Departments*** page.



To create a new department, click on *Add Department,* it contains 2 sub-tabs: *Department Information* and *Department Staff.*



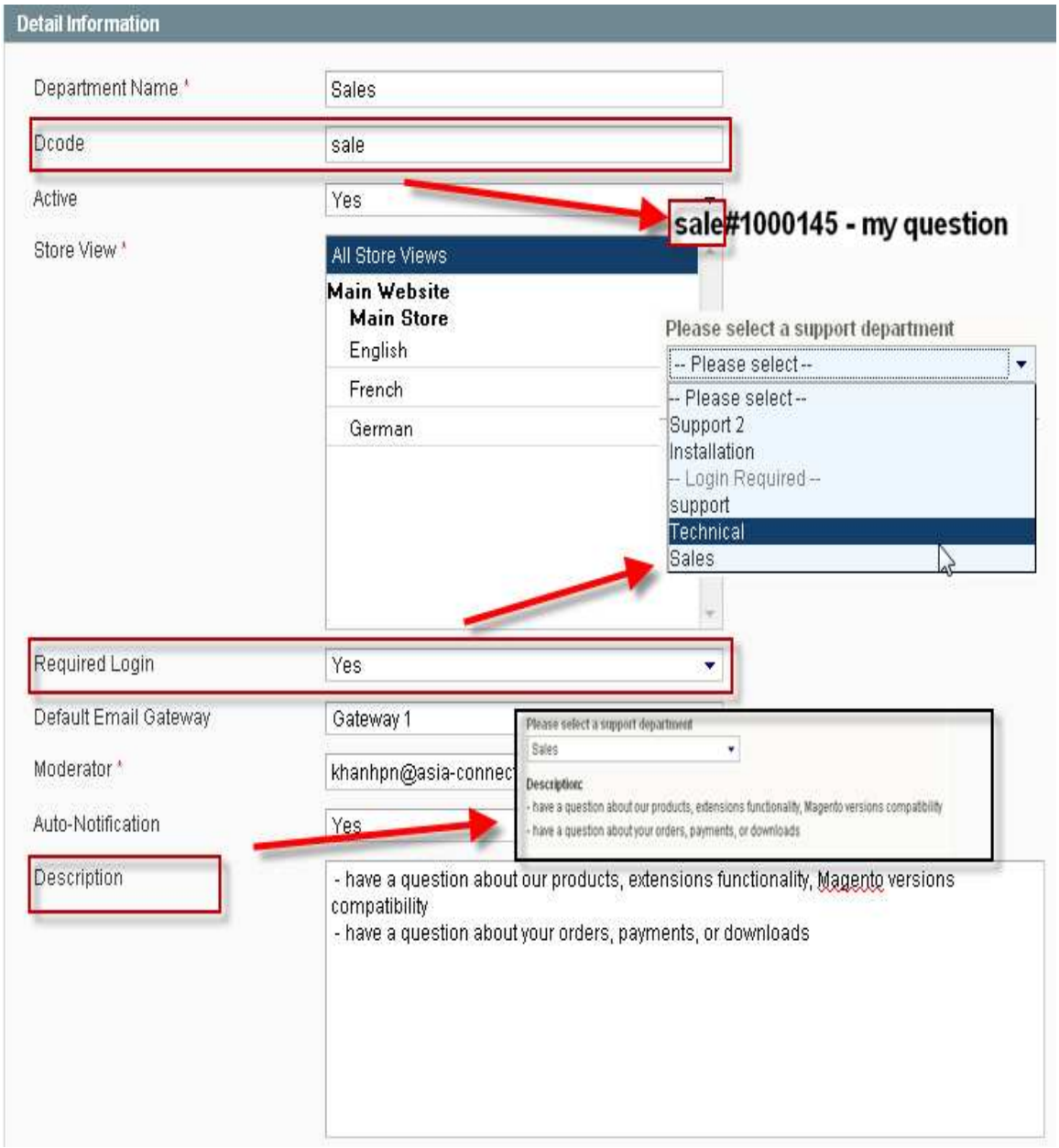
Department Staff displays the list of all operators, tick on the ones who belong to this department.



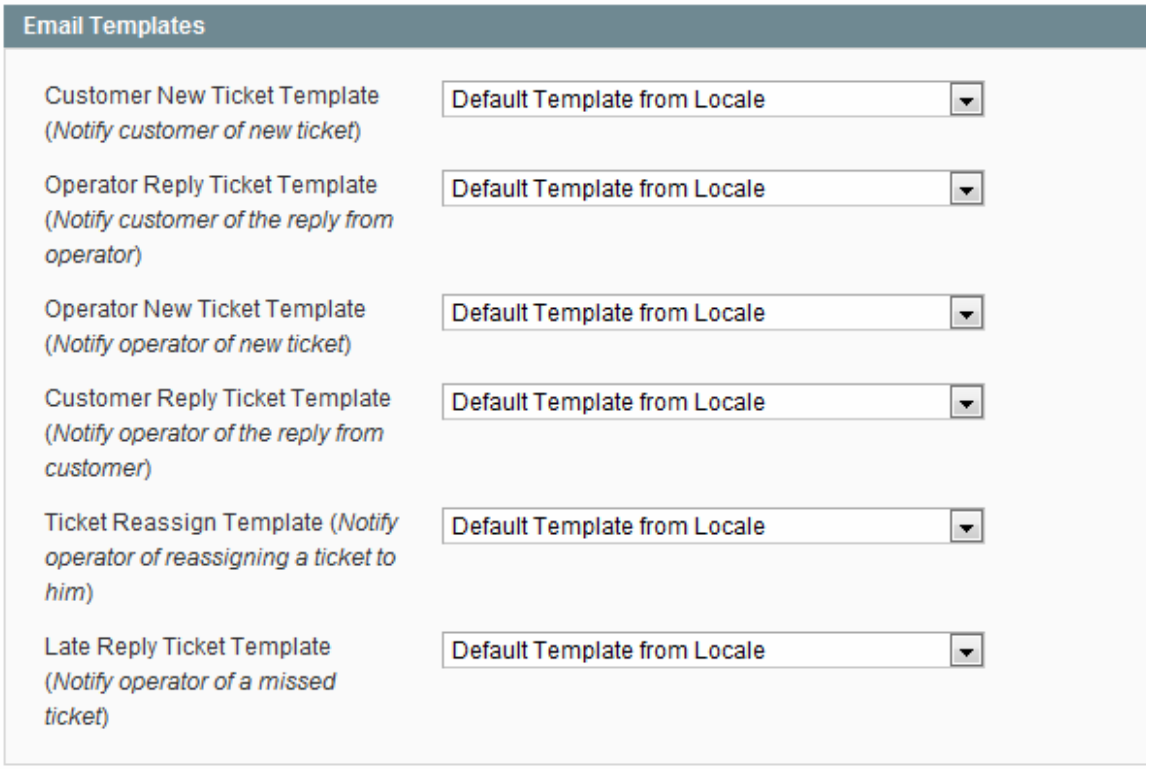
Department Information has all necessary fields such as *Department Name, Dcode, Active, Store View, Required Login, Defaut Email Gateway, Moderator, Auto-notification,* and *Description.*

Note: Pay attention to the followings

- *Dcode:* will be stick at the start of ticket id array (see image below).
- *Required Login:* This field's values (Yes/No) determine to show the required login department or non-required ones when customer create ticket at front-end.
- *Moderator:* Type email of department's moderator. When a department is assigned for a ticket, the ticket will be sent to Moderator's email address (please remember that moderator must belong to department, tick on his mail in Department's Staff).
- *Auto-Notification:* Choose Yes if you want the system send notification to this department if any ticket, sent to the department was missed.
- *Description:* will be displayed together name if customer selects this department.

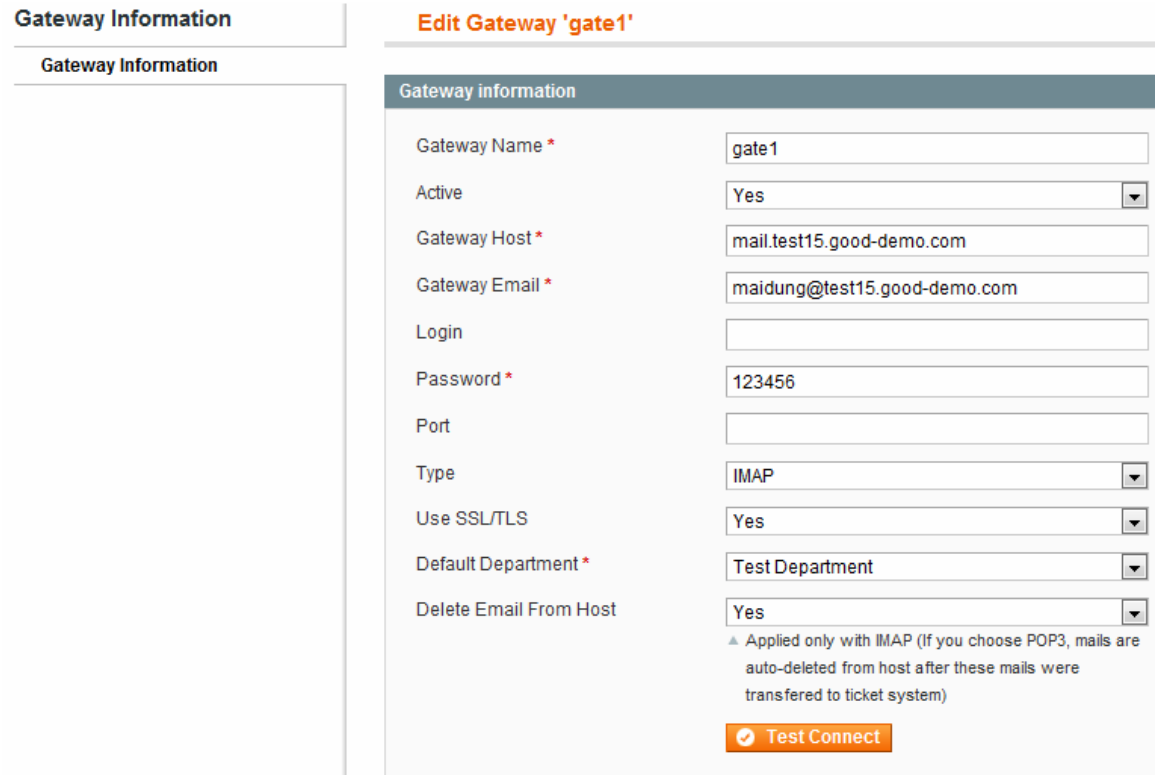


You can choose Email template for this department. If you choose Email template here, the system will apply these templates instead of the selected ones in configuration.


Email Templates
Customer New Ticket Template (Notify customer of new ticket)
Default Template from Locale
Operator Reply Ticket Template (Notify customer of the reply from operator)
Default Template from Locale
Operator New Ticket Template (Notify operator of new ticket)
Default Template from Locale
Customer Reply Ticket Template (Notify operator of the reply from customer)
Default Template from Locale
Ticket Reassign Template (Notify operator of reassigning a ticket to him)
Default Template from Locale
Late Reply Ticket Template (Notify operator of a missed ticket)
Default Template from Locale

5. *Manage Email Gateways*

Help Desk Pro allows you to create more than one email gateways. You can manage and add new gateway by go to *Help Desk Pro – Manage Email Gateways.*



There are some required fields, you must fulfill: G*ateway Name, Gateway Host, Gateway Email, Password* and *Default Department*.

Gateway Name: Specify a name for this gateway

Gateway Host: Specify the address of email server

Gateway Email: Specify the email address that will be used to receive mail from customer.

Login: Specify the login for server access

Password: Define password for server access

Port: Specify the port number to setup the connection with your email server (110 for POP3, 995 for POP3-SSL, 143 for IMAP-TLS, and 993 for IMAP-SSL). This is not a required field, you can pass it.

Default Department: All tickets from mail will be sent to this department.

Type: choose IMAP or POP3 (POP3 and IMAP are two different protocols used to access e-mail.) If you want to learn more about it, please visit the link http://www.businesscreatorpro.com/articles/what-is-imap-and-pop3.php

Use SSL/TLS: Use them for securing your data. If you want to learn about it, please visit the link

http://technet.microsoft.com/en-us/library/cc784450(WS.10).aspx

Delete Email from Host: Choose value for this field when you select IMAP for the field *Type*. If you choose POP3, mails are auto-deleted from host after these mails were transferred to the system.

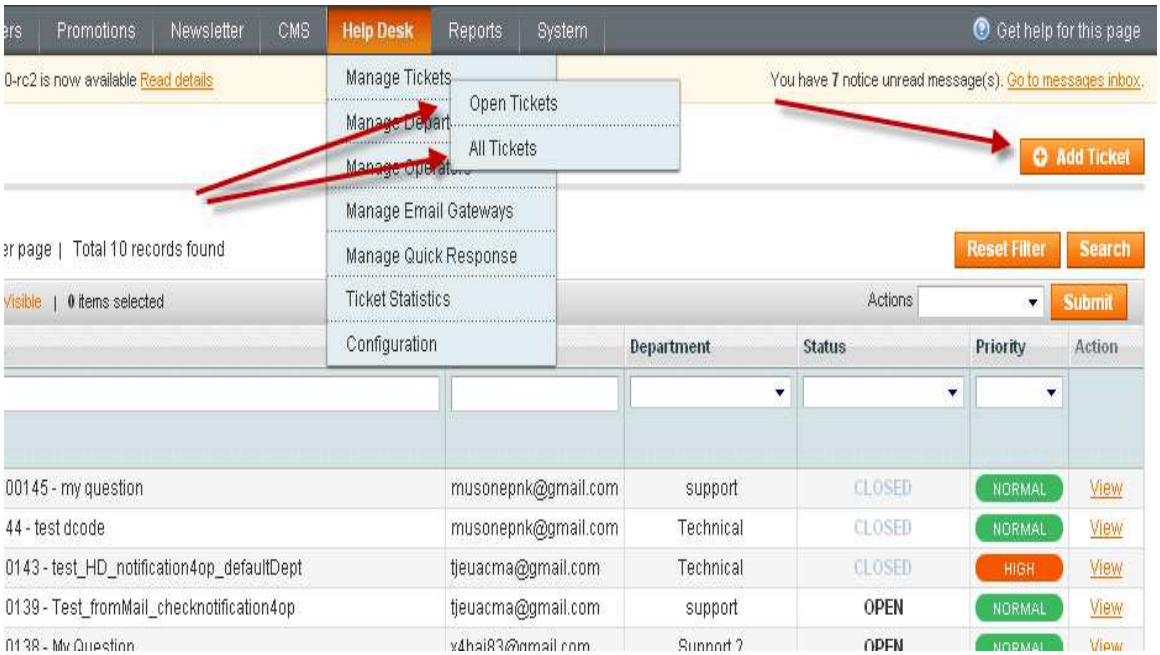
Note:

- After finishing, click on the button *Test Connect* to check. If it notifies "The Gateway connects successfully", the system can create ticket from mail. If it notifies "The Gateway connection is fail", it means you did something wrong, then the system can not create ticket from mail.
- You can create as many gateways as you want but must sure that not use the same Gateway Email (same Gateway Host is ok).

6. Manage Ticket

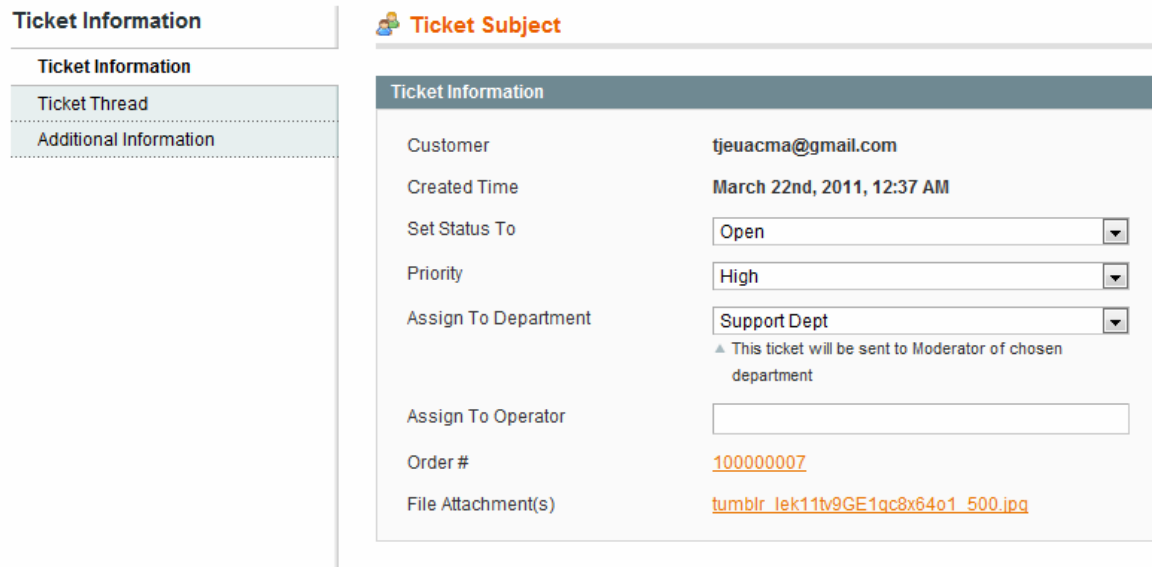
You can find all tickets that customer sent to by going to *Help Desk Pro – Manage Ticket.* There are 2 sub-tabs, *Open Tickets* – list the tickets in "open" status and *All Tickets* – list all ones.

Admin can create new ticket here by choosing *Add Ticket.*



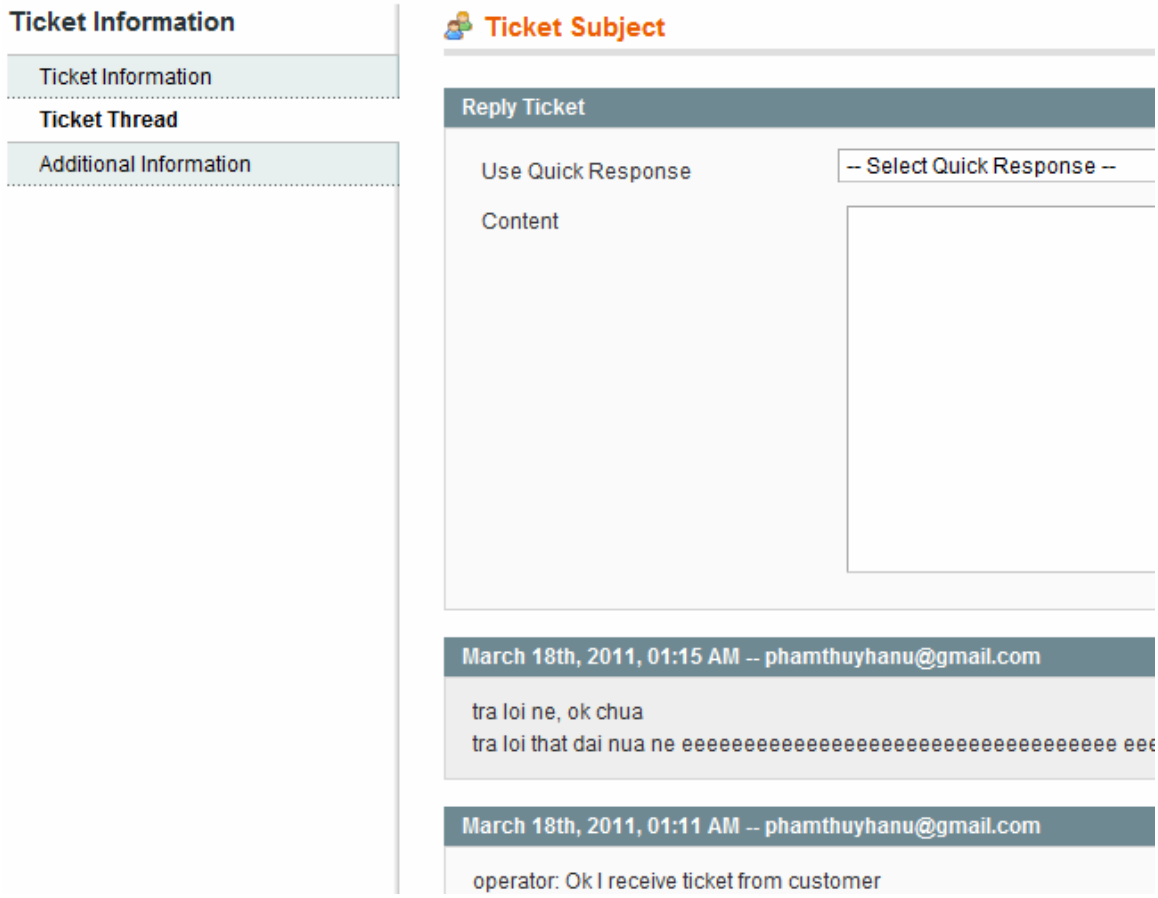
Click on *View* to view a ticket in detail. One ticket has 3 sub-tabs: *Ticket Information, Ticket Thread and Additional Information*.

Ticket Information:

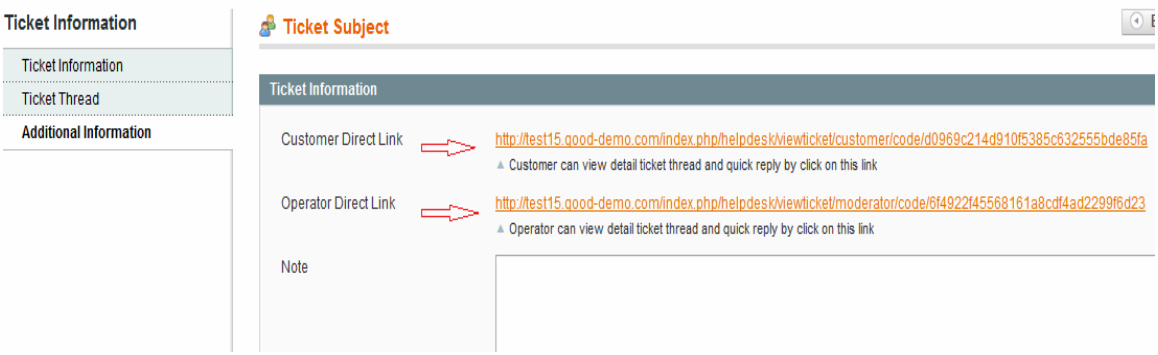


Ticket Information contains all information of a ticket such as *Customer Email, Created Time, Status, Priority, Assigned Department, Assigned Operator, Order link (if any),* and *File Attachment.*

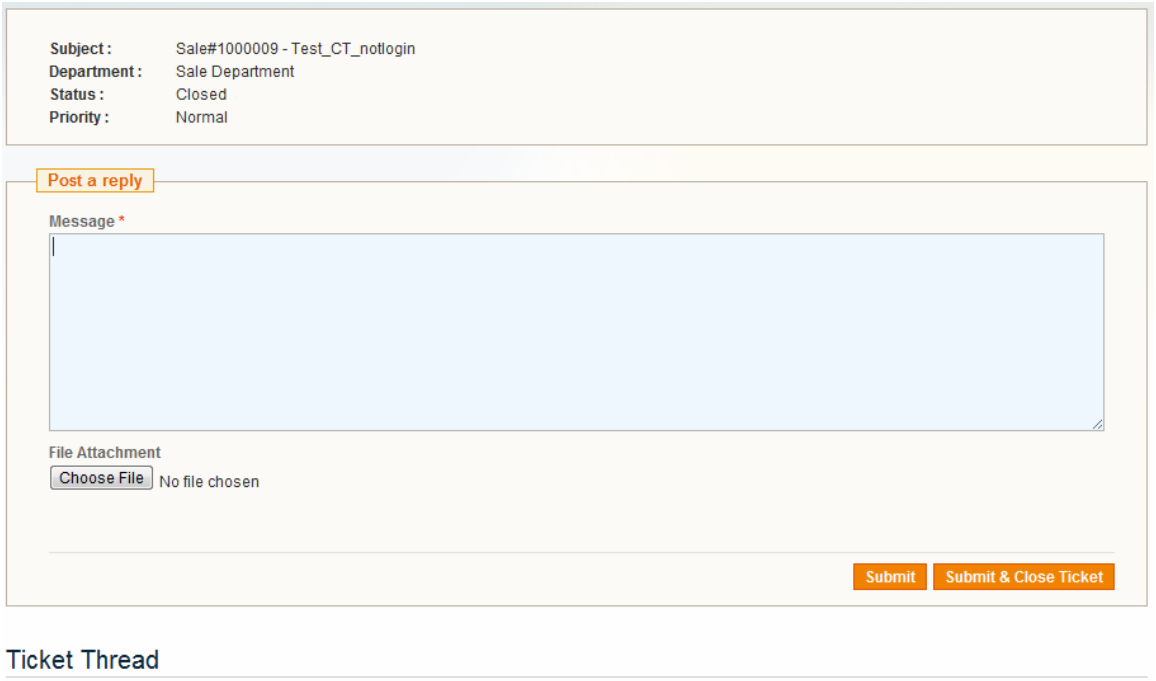
Ticket Thread: You can view history of ticket and reply in *Ticket Thread.*



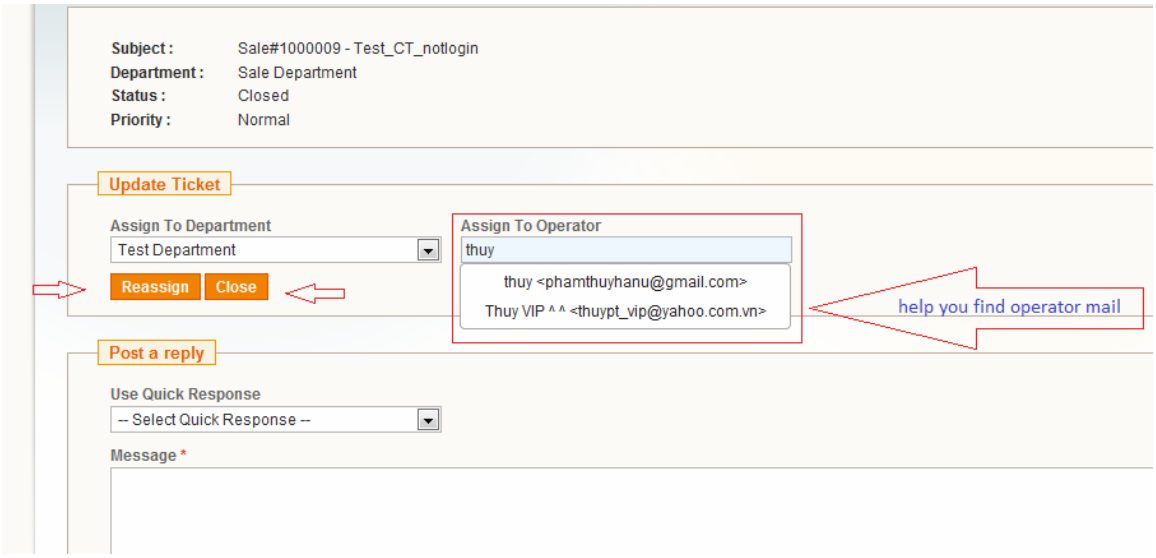
Additional Information: Store 2 direct links for operator and customer (these links are stick with content in mail of operator and customer)



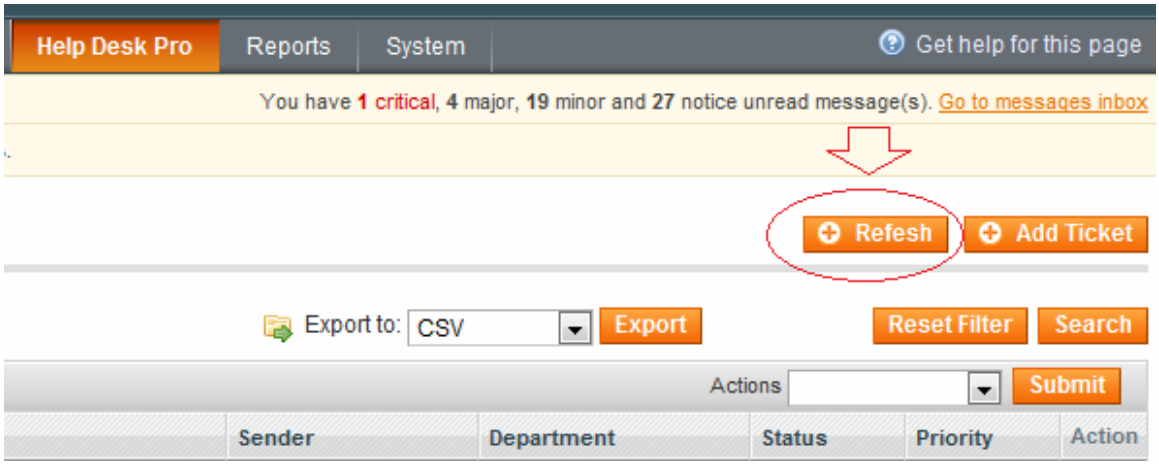
Customer Direct Link: Customers can view all information of ticket while not need to login site. Also, they can reply in direct link and choose close ticket by themselves if wish.



Operator Direct Link: Operators can view, reply (quick response included) and manage ticket while not need to login site. At this step, operator can reassign this ticket to the others and close the ticket if wish.



In *Open Ticket* page, you can see the button *Refresh* on top. Click on this button to run Cron, the system will get mails from host. Refresh page to update the list of open tickets, you might see new tickets if any.



Note:

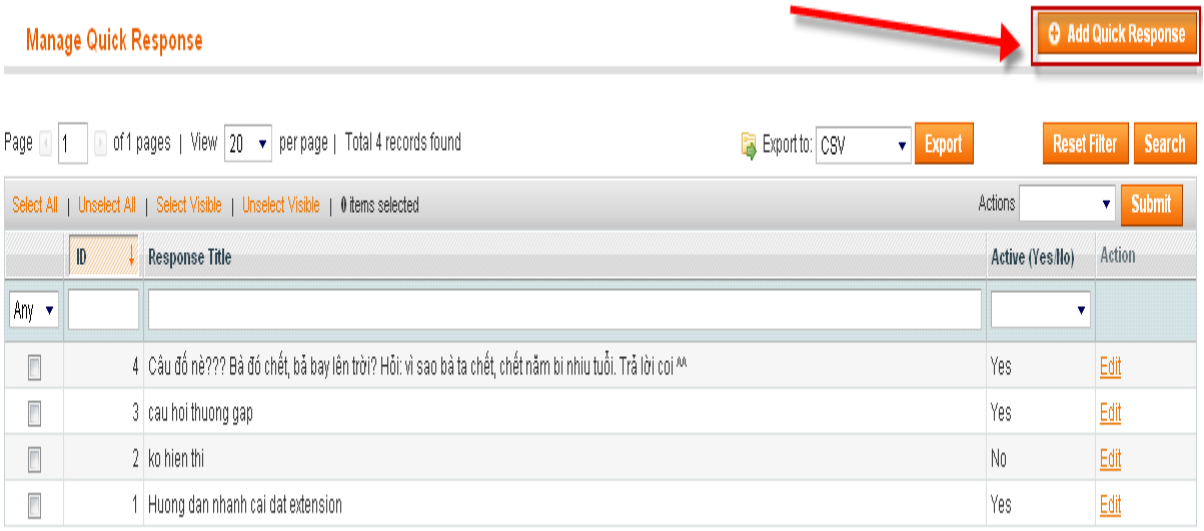
If you meet the problem that can not receive ticket from mail, and when click on the button *Refresh*, it shows alert message "System have not got any email from gateway", please check at Manage Gateways. If you created multi-gateways, you must sure email gateways of them are not the same.

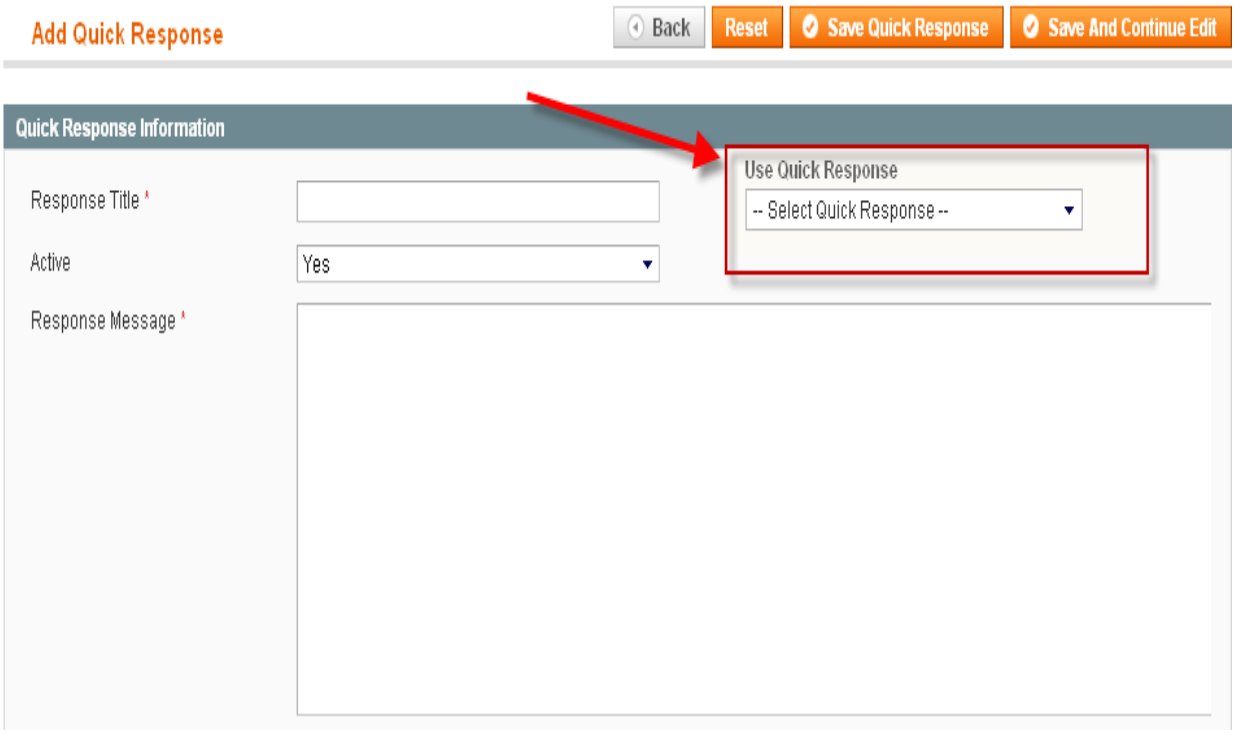
The system also displays the alert message above when there is no mail, being sent to host. Therefore, don't worry.

7. *Manage Quick Response*

You can build a question bank and answers, which are interested by most of your customer by using Quick Response. This helps operator save time. Instead of having to answer the same questions more than one time, they select quick response.

Go to *Help Desk Pro – Manage Quick Response* to create new by your own.

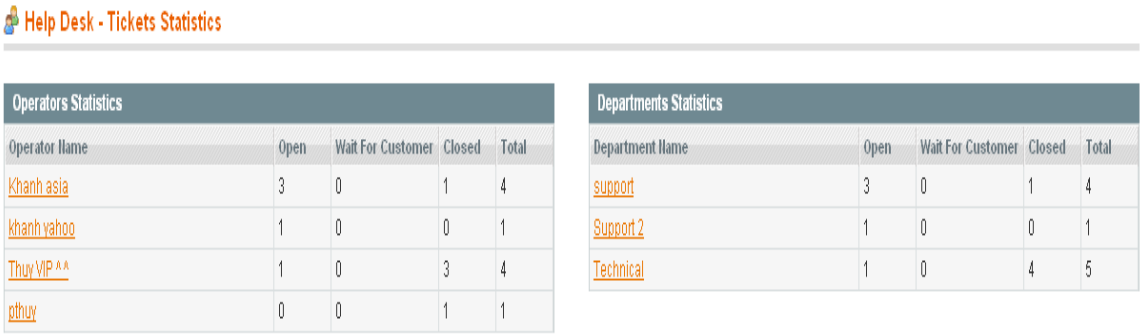

Manage Quick Response
Add Quick Response
Page 1 of 1 pages | View 20 per page | Total 4 records found
Export to: CSV Export
Reset Filter Search
Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected
Actions Submit
ID
Response Title
Active (Yes/No)
Action
4 Câu đố nè??? Bà đó chết, bả bay lên trời? Hỏi: vì sao bà ta chết, chết năm bi nhiu tuổi. Trả lời coi ^^ Yes Edit
3 cau hoi thuong gap Yes Edit
2 ko hien thi No Edit
1 Huong dan nhanh cai dat extension Yes Edit



8. *Ticket statistics*

Ticket statistics provide general view of ticket (status) by departments and operators. Thank to it, you can see your works' efficiency.

Go to *Help Desk Pro – Ticket statistic.*


Help Desk - Tickets Statistics

Operators Statistics

Operator Name	Open	Wait For Customer	Closed	Total
Khanh asia	3	0	1	4
khanh yahoo	1	0	0	1
Thuy VIP ^.^	1	0	3	4
pthuy	0	0	1	1

Departments Statistics

Department Name	Open	Wait For Customer	Closed	Total
support	3	0	1	4
Support 2	1	0	0	1
Technical	1	0	4	5

VI. Cron Configuration

You can read the following instructions on cron job setting for your Magento store:

http://www.magentocommerce.com/wiki/1installation_and_configuration/how_to_setup_a_cron_job

Generally it would be enough to run in SSH console of your server:

crontab -e

And insert the following line:

*/3 * * * * php /<path-to-your-installation>/cron.php

or

*/3 * * * * wget -O - 'http://yourstore.com/cron.php' > /dev/null

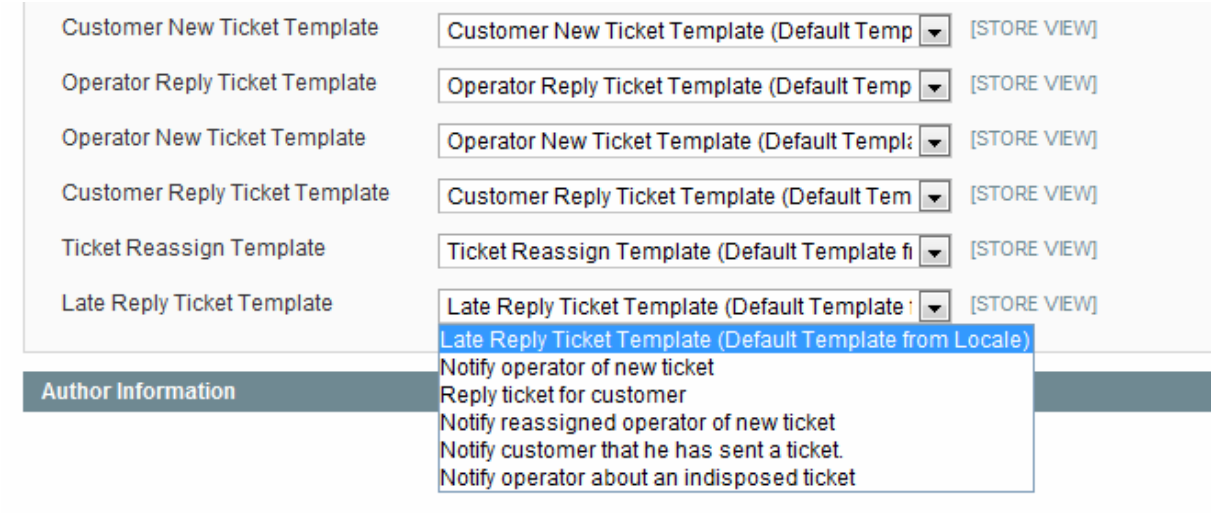
Then exit having the "Save" request confirmed.

VII. Email Templates

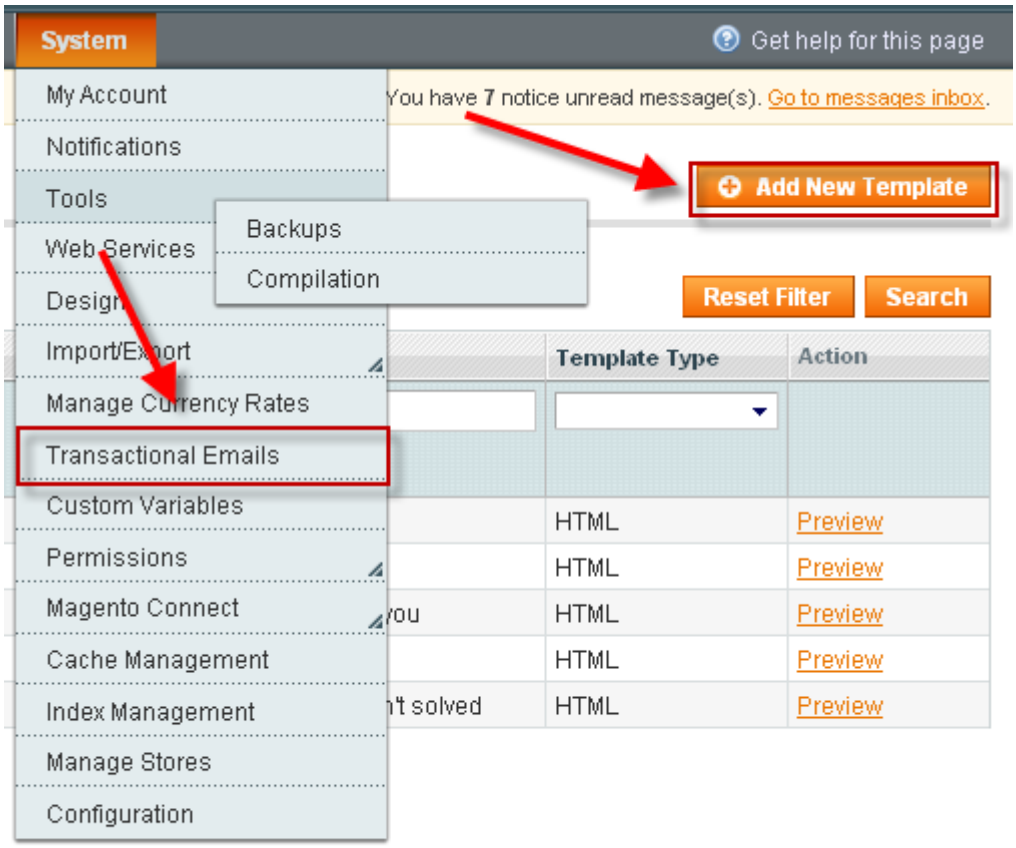
Email templates will be sent together with content when the system sends mail.

We provide some samples in the folder **mw_helpdesk**, you can access it by following the path **app/locale/en_US/template/email/mw_helpdesk.**

When you choose email templates in configuration or for one department, choose the ones having the term “Default Template from Locale” in title.


Customer New Ticket Template
Customer New Ticket Template (Default Temp
[STORE VIEW]
Operator Reply Ticket Template
Operator Reply Ticket Template (Default Temp
[STORE VIEW]
Operator New Ticket Template
Operator New Ticket Template (Default Templ
[STORE VIEW]
Customer Reply Ticket Template
Customer Reply Ticket Template (Default Tem
[STORE VIEW]
Ticket Reassign Template
Ticket Reassign Template (Default Template fi
[STORE VIEW]
Late Reply Ticket Template
Late Reply Ticket Template (Default Template
[STORE VIEW]
Late Reply Ticket Template (Default Template from Locale)
Notify operator of new ticket
Reply ticket for customer
Notify reassigned operator of new ticket
Notify customer that he has sent a ticket.
Notify operator about an indisposed ticket
Author Information

If don't want to use available templates, you can create your own email templates by going to *System – Transactional Emails.*



Note that:

- Templates are chosen in configuration will be applied for all departments.

- In case of you choose other templates for a department; these templates will be applied for this department only.
- Please be aware of this line in our templates:

========= Please enter your reply ABOVE this line =========

The system will get the part of content that is above that line, any below will be discard.